

# Taking Root: A Beginner's Guide to Genealogy



# Step 1: Write What You Know

*Write down what you know. No matter how trivial it may seem.  
Even if you get stuck, your notes will be immensely valuable for someone in the future.*

Every family is different, but this worksheet can help you get started!

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## Your Nuclear Family

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*Relationship*

*Name*

*Birthday(s)  
(if known)*

Yourself: \_\_\_\_\_

\_\_\_\_\_

Father: \_\_\_\_\_

\_\_\_\_\_

Mother: \_\_\_\_\_

\_\_\_\_\_

Brother(s): \_\_\_\_\_

\_\_\_\_\_

Sister(s): \_\_\_\_\_

\_\_\_\_\_

Your Spouse: \_\_\_\_\_

\_\_\_\_\_

Mother-in-law: \_\_\_\_\_

\_\_\_\_\_

Father-in-law: \_\_\_\_\_

\_\_\_\_\_

*(Use the space below to jot down any information of other close family members you'd like)*

# Step 1: Write What You Know

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## Your Ancestors

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*Relationship*

*Name*

*Birthday(s)*  
*(if known)*

Maternal Grandmother: \_\_\_\_\_

\_\_\_\_\_

Maternal Grandfather: \_\_\_\_\_

\_\_\_\_\_

Paternal Grandmother: \_\_\_\_\_

\_\_\_\_\_

Paternal Grandfather: \_\_\_\_\_

\_\_\_\_\_

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## Your Maternal Ancestors

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*(Think of your mother's side of the family, and let's start reaching for the sky!)*

*Relationship*

*Name*

*Birthday(s)*  
*(if known)*

Great-Grandmother 1:  
*(Maternal grandmother's mother)* \_\_\_\_\_

\_\_\_\_\_

Great-Grandfather 2:  
*(Maternal grandmother's father)* \_\_\_\_\_

\_\_\_\_\_

Great-Grandmother 3:  
*(Maternal grandfather's mother)* \_\_\_\_\_

\_\_\_\_\_

Great-Grandfather 4:  
*(Maternal grandfather's father)* \_\_\_\_\_

\_\_\_\_\_

*(Use the space below to jot down any additional information you want to record here)*

# Step 1: Write What You Know

*(continued, p3)*

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## Your Paternal Ancestors

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*(Think of your father's side of the family, and let's start reaching for the sky!)*

*Relationship*

*Name*

*Birthday(s)  
(if known)*

Great-Grandmother 1: \_\_\_\_\_  
*(Paternal grandmother's mother)*

\_\_\_\_\_

Great-Grandfather 2: \_\_\_\_\_  
*(Paternal grandmother's father)*

\_\_\_\_\_

Great-Grandmother 3: \_\_\_\_\_  
*(Paternal grandfather's mother)*

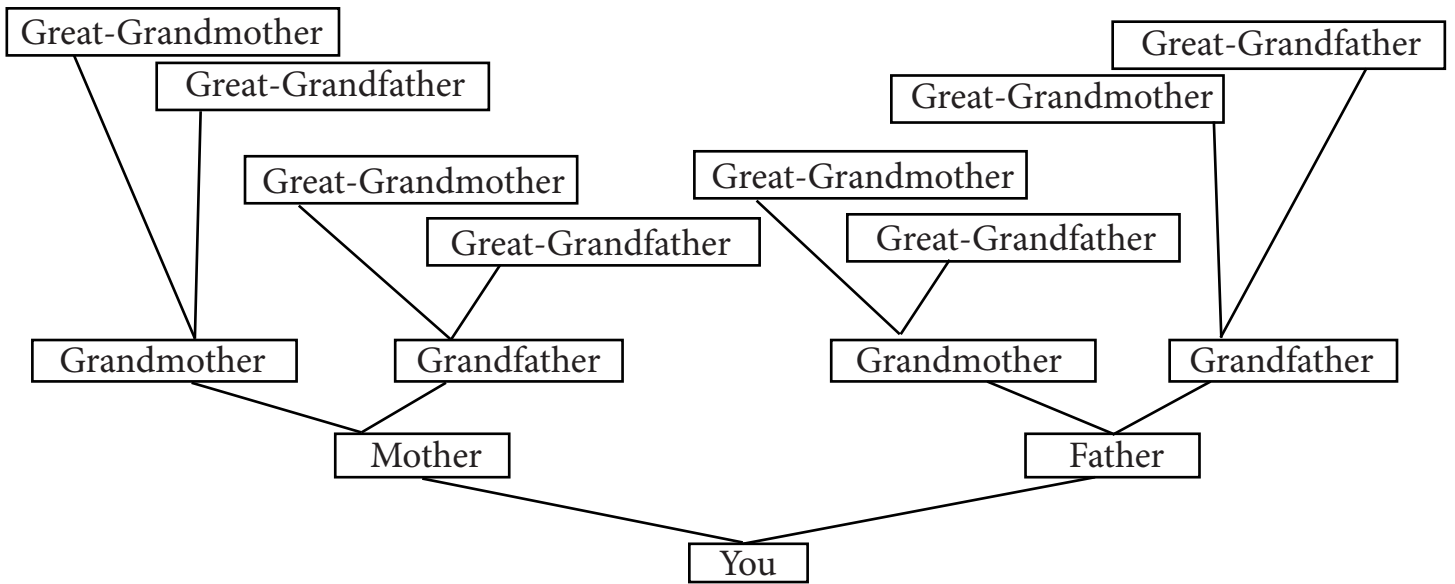
\_\_\_\_\_

Great-Grandfather 4: \_\_\_\_\_  
*(Paternal grandfather's father)*

\_\_\_\_\_

*(Use the space below to jot down any information of other ancestors you'd know)*

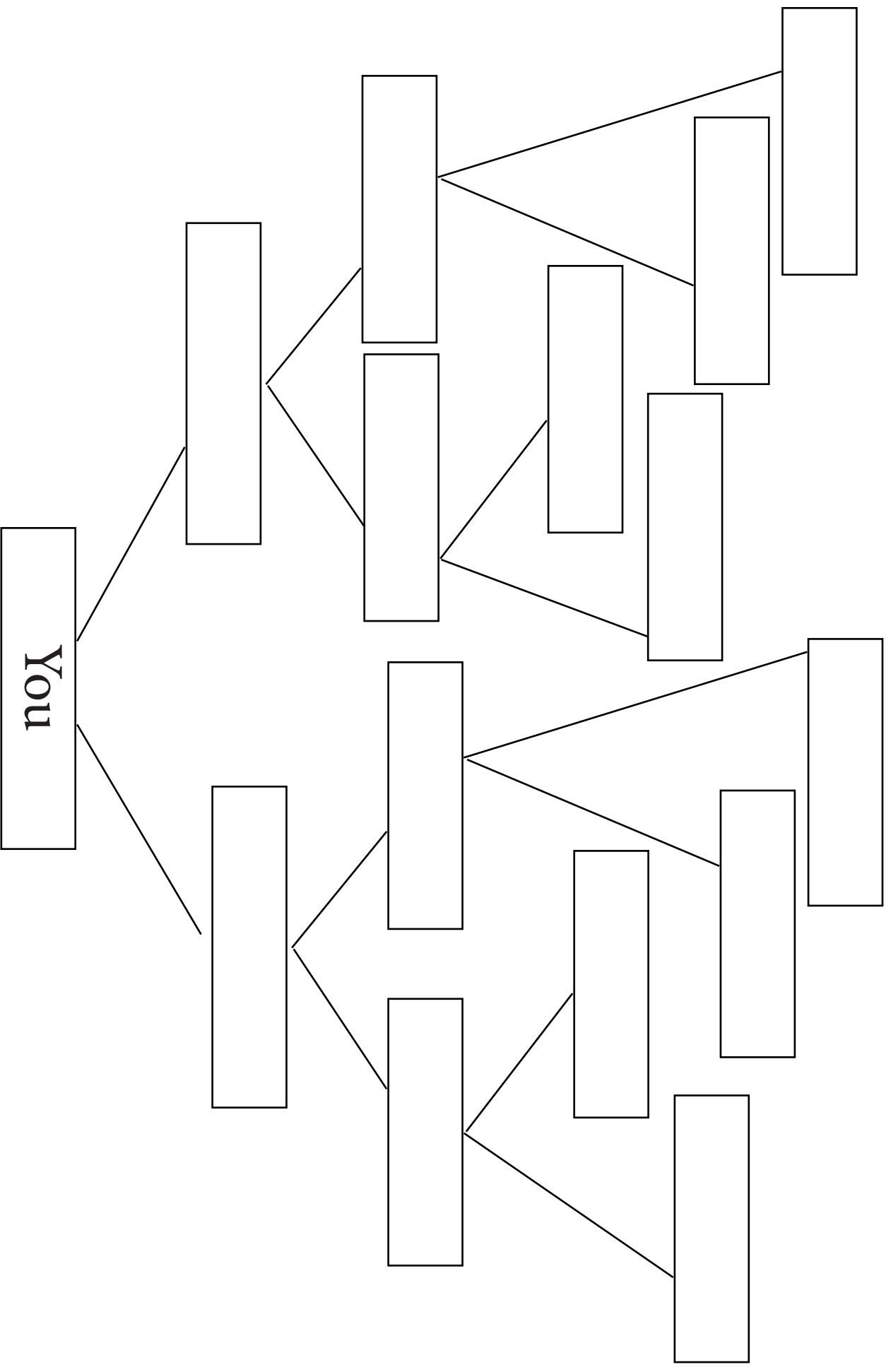
Woohoo!



Look at you go!

*Nice work! From this exercise, you've created a family tree that looks very close to something like this!  
Check out the next page of this workbook to hand-write in your family tree using this format.*

# Family Tree Outline



## Step 2: Interview Your Family Members

*Did you have missing information in your worksheets?*

*Now's the perfect time to interview your family members!*

*Ask your parents, grandparents, relatives, and/or loved ones to help you fill out your missing information.*

*Be sure to take notes on any other genealogical discoveries you might grab!*

## Step 3: Create an online account with a genealogy website and start researching

*The most important things that will help you in your search are records.*

*Records you should pay special attention to are:*

- *Birth Records*
- *Christening (Baptism) Records*
- *Marriage Records*
- *Death Records*
- *Census Records*

*These documents are the glue that will connect those ancestors you jotted down earlier to the rest of your ancestral tree, branching upwards into the expanse of time. There's a ton of genealogy websites out there to help you in your search. These records are key artifacts that will help you uncover your family tree.*

*Genealogical websites/databases of records, photos, family trees include:*

- *FamilySearch (free) (recommended)*
- *Geni (free) (recommended)*
- *Ancestry*
- *Rootsweb (free)*
- *Dead Fred (free)*
- *Find a Grave (free)*

*I would definitely advise creating a FamilySearch account. This free-to-use website has hundreds of thousands of digitized records that are not concealed behind a paywall. Supported by a strong team of volunteers, you can set parameters with names and dates in their free search engine. With enough context clues, you can find the birth, death, and marriage records and so much more (even photos!).*

*I would also recommend signing up for Geni - a more crowd-sourced gathering of information. Individuals create their family tree and individual profiles (much akin to a social media profile). When Geni suspects you have a match with another family tree researcher, it recommends that you merge profiles with that researcher. I have been able to "piggy-back" off the research this way, going all the way back to the 1500s because of someone else's diligent research. It's a great way to source a significant amount of information quickly and fairly accurately.*

## Step 4: Start digitizing and sharing your findings

*Start creating a digital catalogue of all your findings.*

*There are two main ways to save your data:*

- *Over the internet through online genealogical websites*
- *On your computer/hard-drive/thumb-drive*

*I would personally recommend using both methods to save your information. Websites always have the risk of someday shutting down and closing their doors, leaving you without your hard-earned information. Similar with cloud services. At the same time, there is always the chance of files being corrupted on your own personal devices. Saving a copy of your information on your computer, hard-drive, and/or thumb-drive is a great backup to websites, and vice-versa. I would recommend getting in the habit of doing both.*

*Typing and organizing your information is longer-lasting and less likely to be misplaced. It's also very handy for sharing with others if you decide to take a break from your research and come back to it. No need to stare at handwriting to try to decipher its contents if you've organized it digitally.*

*Digitizing information not only helps you, but it makes it easier to share and can help others in their searches.*

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### Your Digitizing Checklist

*Digital saves can be done on genealogy website's account and/or personal computer/hard-drive.*

	<i>Account</i>	<i>Hard-Drive</i>
Create an account with a genealogical website:	<input type="checkbox"/>	
Save digital records (birth, marriage, etc.) on your online account and/or hard-drive:	<input type="checkbox"/>	<input type="checkbox"/>
Create digital family trees:	<input type="checkbox"/>	<input type="checkbox"/>
Save, store, and organize digital photographs:	<input type="checkbox"/>	<input type="checkbox"/>
Record your research progress by typing your notes:	<input type="checkbox"/>	<input type="checkbox"/>
Organize your findings into folders for easy navigation:		<input type="checkbox"/>



# Step 5: Digitize Photos, Record Interviews

*This is perhaps the most personal step of the process.  
You should digitize your family photos and start recording memories.*

*Natural disasters like floods or fires are positively devastating.  
Digitizing your family photographs ensures that these priceless memories stay preserved.*

## **Sharing is caring - and it's smart!**

*Sharing these digitized photos among your family members further ensures their preservation.  
Multiple locations for the same information is a great safeguard.*

*Recording memories makes for a beautiful addition to any family history.  
Oral family history is wonderful, but these stories are always at risk of becoming tall tales.  
These memories are always at risk of being altered and elaborated upon until only a fraction of the truth remains.  
Record memories either in the form of personal essays or through interviews with your elders.  
They are destined to become timeless artifacts that will certainly be cherished by future generations to come.*



## **Create a Digitization Plan**

*Here are some questions that can help you get started.*

- *Who in my family has the greatest wealth of knowledge?*
- *Who is currently in possession of the photos in my family?*
- *Does the time/investment to purchase a scanner to scan these photos myself make sense? Or should I hire a company to do it for me?*
- *If I hire a company to digitize photos, might other family members pitch-in on costs?*
- *How do I want to store the original photos after I digitize them?*
- *How do I want to organize the original photos for scanning?*
- *What equipment do I need for interviews? Does my local library offer rentals?*
- *What format do I want to save interviews: an audio file or a video file?*
- *How do I want to conduct interviews with my elders?*
- *Who in my family might be the most fun to interview first?*
- *Where might I be able to find some good prompts/starter questions for interviews?*
- *What about my family history do I most want to preserve as part of our legacy?*

# Step 5: Digitize Photos, Record Interviews

(continued, p2)

Now that we've got these questions bubbling in your mind, let's take a moment to organize your thoughts.



## Alright Ya'll, Who's Got What?

Take some time to ask family members about photos and heirlooms and who might have what.

Having these things spread about is not necessarily a bad thing! It can safeguard them from natural disasters.

To start the digitization process, however, keep a record of where things are.

When you're ready to start digitizing, you'll be able to reference this worksheet to track them down for preservation.

Name: \_\_\_\_\_ Contact: \_\_\_\_\_

Relationship: \_\_\_\_\_ *What do they have?*      Photos      Documents      Heirlooms      Records  
                                                                 

Detailed list: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name: \_\_\_\_\_ Contact: \_\_\_\_\_

Relationship: \_\_\_\_\_ *What do they have?*      Photos      Documents      Heirlooms      Records  
                                                                 

Detailed list: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name: \_\_\_\_\_ Contact: \_\_\_\_\_

Relationship: \_\_\_\_\_ *What do they have?*      Photos      Documents      Heirlooms      Records  
                                                                 

Detailed list: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Step 5: Digitize Photos, Record Interviews

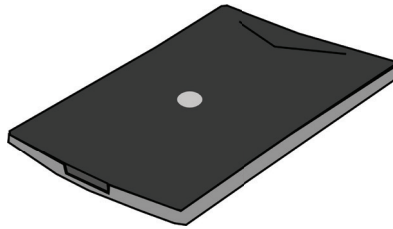
*(continued, p3)*

*To scan yourself or not scan yourself...that is the important question!  
Do you digitize photos and documents on your own or do you hire a scanning company?  
Let's find the best fit for you.*

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## Scanning Pros and Cons (DIY vs. Outsourcing)



### Do-It-Yourself

#### *Pros*

- *The project will cost less money overall*
- *You can be a perfectionist*
- *You'll get acquainted with your photos/docs*
- *Complete control over digitization*
- *You never have to send away your photos*

#### *Cons*

- *Extremely time-consuming*
- *Learning curves with the tech*
- *Risk of costly amateur mistakes*
- *Tedious nature can be discouraging*
- *Good scanners can be expensive*

### Hire a Reputable Company

#### *Pros*

- *Level of expertise on your side*
- *Proper care ensured*
- *Guaranteed proper digitization*
- *Don't need to learn new tech/skills*
- *Only spending money, not time*

#### *Cons*

- *The project will cost more money overall*
- *Level of trust needed with company*
- *May have to send away your photos/docs*
- *Photos will be temporarily out of possession*
- *Need diligent research to ensure reputation*

**What are your thoughts?**

# Step 5: Digitize Photos, Record Interviews

*(continued, p4)*

*Interviews are a great way to gather valuable information quickly.  
Here's some tips on how you can get started.*

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## Interviewing Basics

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### Figure out your Equipment

*You can purchase a microphone, audio recorder, or video camera for your interview.*

*Equipment doesn't need to be expensive!*

*Research some affordable options that have great reviews.*

*Alternatively, you can see if your local library or college offers equipment rentals.*

*Remember, devices and programs you already have may do the trick.*

### Prepare questions to guide the interview

*Think about the things you want to know more about.*

*Create a list of questions you'd like to ask to help guide the conversation.*

*Ask about their ancestors who they may have known growing up.*

*Research to see what historical events happened in the interviewee's life.*

*They may have a unique connection with historical events.*

*They can also provide some really interesting and facinating primary source perspectives on history.*

### Some helpful tips:

- *Interviews can be as serious or candid as you'd like.*
- *Think about the things you want to know more about, and be sure to ask.*
- *Embrace tangents - they could lead to some great things you didn't know before!*
- *Photographs and heirlooms are a great way to trigger memories and stories.*
- *Be an active listener - take opportunities to ask for more details.*
- *Remember to take breaks!*
- *Don't feel pressured to ask everything in one sitting. You can have multiple interviews.*
- *Have fun! This is a great opportunity to spend time with loved ones - don't sweat it.*

## Step 6: Create a Scrapbook

*Consider this the “boss level” step of preserving your family history.  
It’s one of the final things you’ll do that will ultimately stand the test of time.  
It’s tough, but oh-so rewarding!*

*Creating a scrapbook is a great way to safeguard all your hard-earned research and digitization efforts.  
It’s a lot of fun and a great chance to be creative too!*

*Of course you can scrapbook the traditional way: with arts and crafts supplies, printing of copies of your digitized photographs and placing them in the pages of your scrapbook to your liking.*

**However, there is another option!**

*A digital scrapbook!*

*Not only can you preserve your information in a book format, but you can present it in a creative and visually aesthetic way. It will not only be a family heirloom that will stand the test of time, but due to its digital foundation, it can ultimately be added on to as time progresses!*

*A digital scrapbook is one that can be shared to anyone digitally or printed out for loved ones.*

*You can even make it so that extended family can purchase your scrapbook online.*

*This eliminates extensive personal printing costs.*

*Creating a digital scrapbook is the ultimate way to preserve your family history – definitely give it a thought.*

*Stay tuned to my blog, newsletter, and future publications.*

*I’ll be writing more on how you can commission or create a digital scrapbook very soon.*

# Hurray! You Did It!

*Congratulations!*

*You made it through "Taking Root: A Beginner's Guide to Genealogy"!  
I hope these worksheets were helpful and helped you on your journey to discover your family's past.*

*If this free worksheet helped you and you'd like to support more content like this, please feel free to drop a thank-you tip in my website's tip jar. I'd love to get into writing and providing even more content like this, and your support will help me get there.*

*Be sure to subscribe to my email listserv so you can be notified when more content arises.*

*And of course, share share share alike with friends and family who you think might benefit from this information.*

## Thank you!



## And Happy Discovering!